



**Indiana**  
**Department**  
**of**  
**Health**

# INSTEP MONTHLY SUMMARY REPORTING (MSR) TRAINING

GENOMICS AND NEWBORN SCREENING  
PROGRAM

2023



## GNBS MISSION:

To equitably serve Hoosiers with genetic conditions and birth defects by providing timely identification and access to resources with the top goals of community partnership, family engagement, awareness activities and surveillance.

## GNBS VISION:

Every Hoosier has access to the genetic services and therapies they need to achieve well-being at all stages of life.



# Purpose

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- Enhance and refresh MSR reporter knowledge of monthly summary reporting (MSRs)
- Improve the accuracy of MSRs
- Improve the timeliness of MSRs
- Improve overall timeliness of NBS follow-up to reduce infant mortality



# Learning Objectives

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- Know what the monthly summary reports are and why they are important
- Know when to report a newborn as a screening exception and which exception type to use
- Understand how to enter and submit monthly screening exceptions
- Understand how to enter and submit monthly summary data
- Know who to contact if you need help with your MSR



# Topics Within This Training

## 1. MSR General Information

MSR summary vs. MSR exceptions



## 2. Gaining Access & Logging into INSTEP in Gateway

How to register for access and log in



## 3. MSR Exception Entry

Detailed exception types | Step-by-step instructions



## 4. MSR Summary Entry

Step-by-step instructions





# 1. MSR General Information



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# MSR General Information

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## What is an MSR?

- Monthly summary reports (MSR) are state-mandated reports that include information about how many infants were screened and details about the infants who were not screened.
  - Number of live births
  - Number of home births who received screening
  - Number of walk-ins who received screening
  - Number of exceptions to screening: INSTEP automatically generates this number based on how many exceptions were entered
  - Number of screens performed

## Why are MSRs important?

- The overall purpose of MSRs is to ensure that all babies born in Indiana are receiving valid screens, rescreens, and getting the follow-up care they need.



# MSR General Information

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## What is the difference between MSR exceptions and the MSR summary?

- **MSR exceptions** are detailed entries done for each infant who did not complete a screening for a valid reason.
- The **MSR summary** includes numeric totals.

Each MSR type (heel stick and pulse ox) has two parts:

- + **Heelstick MSR Exception Entry**  
**Heelstick MSR Summary**
- + **Pulse Oximetry MSR Exception Entry**  
**Pulse Oximetry MSR Summary**



# MSR General Information

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## When are MSRs due?

- MSRs are due by 5 p.m. EST on the 15th of each month.
- MSR exceptions should be entered as they occur.

**Hardcopy MSR available on the GNBS website.**

## Who do I contact if I have a problem with MSR reporting?

- NBS Reporting Coordinator
  - Phone: 317-233-7019
  - Email: [NewbornScreening@health.in.gov](mailto:NewbornScreening@health.in.gov)





## Welcome to Access Indiana

The State of Indiana's Single Sign-On Portal  
Conduct business with ease and security

Don't have an account?

[Sign Up for Access Indiana](#)

➔ Sign In with Access Indiana

[Don't have an Access Indiana account?](#)

Email

|

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# 2a. Gaining Access to INSTEP in Gateway



# Gaining Access to INSTEP in Gateway

1. Navigate to IDOH State Health Gateway at [gateway.isdh.in.gov/Gateway](http://gateway.isdh.in.gov/Gateway)
2. Click **Step 1** to register for an Access Indiana account.

Secure Account Sign In

*Step 1 - New User Register with Access Indiana.*

>> Register to Access Indiana

*Step 2 - Request for Gateway or New Application Access :*

>> Request Access

*Step 3 - Registered users with Gateway and Accesss Indiana :*

>> Sign in with Access Indiana



# Gaining Access to INSTEP in Gateway

3. Click **Step 2** to request access to INSTEP application through Gateway.
4. Complete all required fields of the form that appears in the web browser.

**Secure Account Sign In**

*Step 1 - New User Register with Access Indiana.*

>> Register to Access Indiana

*Step 2 - Request for Gateway or New Application Access :*

>> Request Access

*Step 3 - Registered users with Gateway and Accesss Indiana :*

>> Sign in with Access Indiana



# Gaining Access to INSTEP in Gateway

5. In the Request Type drop-down, select the option that pertains to you:
  - a) If you do not have a Gateway account, then select "New User Request for the Gateway Access".
  - b) If you have a Gateway account for another purpose (EARS, Lead reporting, Perinatal Levels of Care etc.) select "Existing User Requesting for New Application Access".
6. In the Application drop-down menu, select "INSTEP".
7. In the "Additional Comments" section, **add a note that you need access to MSR reporting for heel stick and/or pulse ox** (whichever is needed).
8. Your request may take 1-3 business days to process. Contact [NewbornScreening@health.in.gov](mailto:NewbornScreening@health.in.gov) if you still do not have access after this timeframe.

**User Details**

Fields with an (\*) indicate they are required.

\* Request Type:

\* First Name:

Middle Name:

\* Last Name:

\* Organization Name:

\* Application:

\* Email:

\* Phone Number:

Additional Comment's :

**B** *I* U Size  Font Name  **A**

Design HTML Preview

Request Access



# Gaining Access to INSTEP in Gateway

9. After your request has been processed, you will receive an email. Visit the [IDOH Gateway](#) use **Step 3** to **sign in** with your Access Indiana account.
10. Click **Step 3** each time you need to **sign into INSTEP**.

**Secure Account Sign In**

*Step 1 - New User Register with Access Indiana.*

>> Register to Access Indiana

*Step 2 - Request for Gateway or New Application Access :*

>> Request Access

*Step 3 - Registered users with Gateway and Accesss Indiana :*

>> Sign in with Access Indiana





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➔ Sign In with Access Indiana

[Don't have an Access Indiana account?](#)

Email

|

Continue



# 2b. Logging Into INSTEP



# Step 1: Gather Information

Ensure all information is easily accessible and ready to be entered!



## Infant's information:

- Full name
- Date and time of Birth
- NBS requisition number
- MRN number
- Sex
- Birth order
- PCP name and contact information
- Exception type (reason not screened)

## Mother's information:

- Full name and maiden name
  - Date of birth
  - Address
  - Phone number
- ## Other Notes or Results:
- Heel stick and/or pulse ox scores for all infants transferred out of state.



# Step 2: Log Into Access Indiana and Enter Gateway

- Navigate to Gateway at [gateway.isdh.in.gov/Gateway](http://gateway.isdh.in.gov/Gateway)
- Log in using your Access Indiana login information

INDIANA DEPARTMENT OF HEALTH  
STATE HEALTH GATEWAY

Login Help

**IMPORTANT NOTICE:**

To continue using the Gateway you must register for an Access Indiana account.

To register for your account, click the **Register with Access Indiana** button in the menu on the right. Click [here](#) for instructions on logging into the IDOH Gateway with Access Indiana.

For Access Indiana assistance, please call 1-866-960-3023 8:00 AM – 9:00 PM, M – F, 9:00 AM – 1:00 PM Sat.

Thank you for your cooperation,  
IDOH

The Indiana Department of Health – State Health Gateway is a health portal dedicated to providing information and services to health care professionals, labs, local health departments, and Health Information Exchanges (HIE) in Indiana.

Secure Account Sign In

*Step 1 - New User Register with Access Indiana.*

>> Register to Access Indiana

*Step 2 - Request for Gateway or New Application Access :*

>> Request Access

*Step 3 - Registered users with Gateway and Access Indiana :*

>> Sign in with Access Indiana

# Step 3: Enter the INSTEP Application

- Click the INSTEP tab to navigate to the INSTEP application



App Admin My Profile Home

INDIANA STATE DEPARTMENT OF HEALTH  
STATE HEALTH GATEWAY

Logged in as Jennifer Haller | Logout

HD Upload INSTEP Organization Mgmt Physician Reporting

ISDH Gateway Messages  
\*No new messages.

Quick Info Links

- Maternal and Child Health
- Indiana Intelligence Fusion Center
- Indiana State Department of Health
- Indiana Birth Defects and Problems Registry
- Severe Adverse Event Reporting (Documentation)
- Newborn Screening Coding and Terminology Guide
- Centers for Disease Control and Prevention (CDC)

Gateway Account Info

**Jennifer Haller**

Email:  
jhaller@isdh.in.gov

Phone Number(s):  
(317) 233-1297

Organization affiliations:  
INDIANA STATE DEPARTMENT OF HEALTH

Address(es):  
2 N MERIDIAN ST  
INDIANAPOLIS, IN  
Office (Primary)

If any of this contact information is out of date,  
please update it in the "My Profile" page.





### 3. MSR Exception Entry

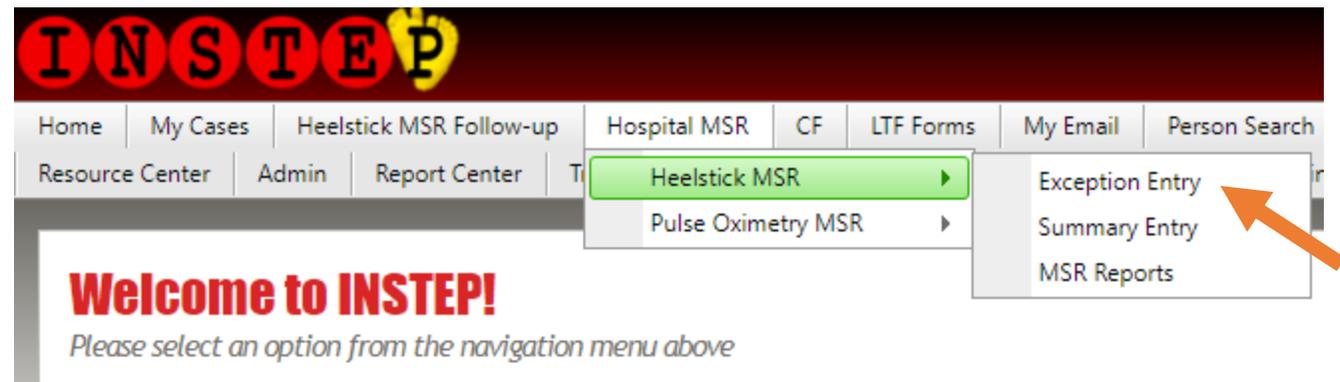
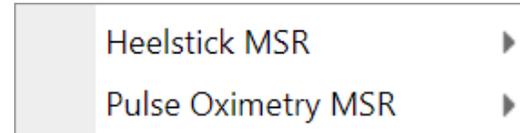


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# Step 1: Go to the MSR Exception Entry Page

- Hover cursor over the “hospital MSR” tab on the INSTEP home screen menu
- Hover cursor over the correct MSR type:
  - **You must select “exception entry” first if you have any exceptions (newborns who were not screened).**
    - Click “summary entry” first only if you have no exceptions for the month.
    - You will be able to add new MSR month from the heel stick MSR summary page.
- Click “exception entry” to begin entering exception information for whichever MSR type you have selected.



# Step 2: Add or Verify Your Contact Information

1. Select your organization.
2. Select your name in the contact name dropdown.
  - a. Check that the contact information is correct and up-to-date
3. If your name does NOT appear in the contact name dropdown list, click the "add contact" link under "contact name".
4. Once finished, click "Next" at the bottom of the page.

## Heelstick MSR Exception Entry

Use this form to report exceptions to the heelstick newborn screening process.

Identify Organization and Contact Details

Select the organization and contact reporting the exception. If the organization is not listed, please contact

Organization name:  !

Contact name:

[Add Contact](#)

Contact Information

|               |                     |
|---------------|---------------------|
| Title:        | State User          |
| First Name:   | Meegan              |
| Last Name:    | Voss                |
| Phone Number: | (317) 233-7019      |
| Email:        | mvoss@health.in.gov |

[Edit Contact Information](#)



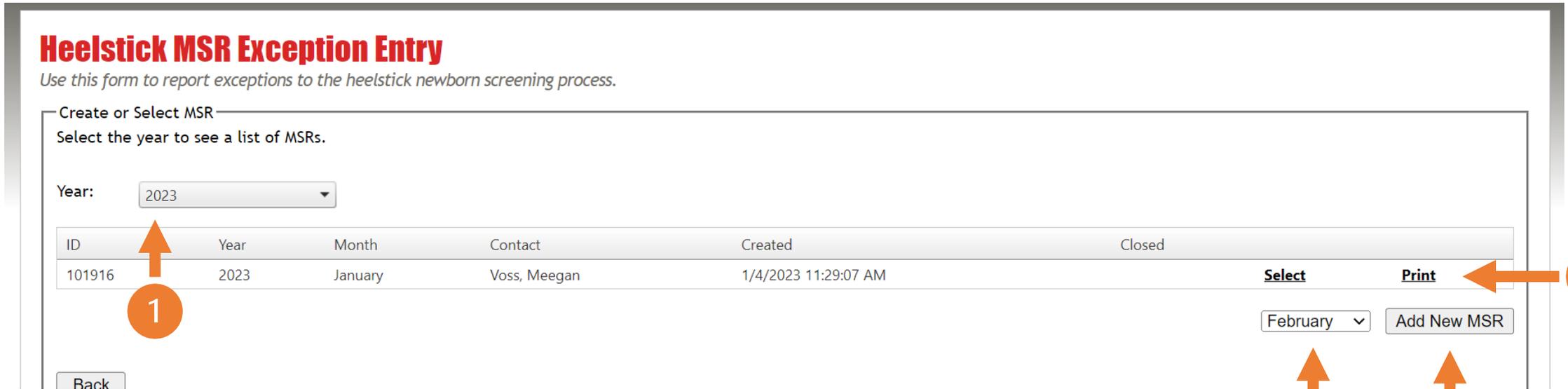
# Step 3. Create a New MSR Entry

**Heelstick MSR Exception Entry**  
Use this form to report exceptions to the heelstick newborn screening process.

Create or Select MSR  
Select the year to see a list of MSRs.

Year:

| ID     | Year | Month   | Contact      | Created              | Closed | Select | Print |
|--------|------|---------|--------------|----------------------|--------|--------|-------|
| 101916 | 2023 | January | Voss, Meegan | 1/4/2023 11:29:07 AM |        |        |       |



## Create a new MSR:

1. Select the **year** of the report (top left dropdown).
2. Select the **month** of the report (bottom right corner).
3. Click "**Add New MSR**" button.
  - a. INSTEP will refresh & display the new MSR you created.
4. Click the "**Select**" link by the new MSR to begin entering data.



# Step 7: Review Unresolved Holdovers

Enter MRN  Search

1

## Unresolved Holdovers

There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to promote the record to an exception on the current report.

| PID     | ID    | Name              | DOB        | BO | Exception                               | MRN |                         |                         |
|---------|-------|-------------------|------------|----|---|-----|-------------------------|-------------------------|
| 7720297 | 67183 | RETRIEVER, MURPHY | 02/01/2023 | 1  | Transfer Out Without Screen             | 123 | <a href="#">Accept</a>  | <a href="#">Decline</a> |
| 7720300 | 67184 | OWL, CLIFTY       | 01/20/2023 | 1  | Supplemental Oxygen/Respiratory Support | 123 | <a href="#">Promote</a> |                         |

## Current Exceptions

There are some exceptions already entered on this MSR. They may be edited while the MSR is open. Please select a record below to edit the detail.

| PID     | Name              | DOB        | BO | Exception                               | MRN      |                      |                        |                               |
|---------|-------------------|------------|----|---|----------|----------------------|------------------------|-------------------------------|
| 7720274 | ARMADILLO, JUNIOR | 02/02/2023 | 1  | Transfer Out Without Screen             | 00001    | <a href="#">Edit</a> | <a href="#">Remove</a> | <a href="#">View the Chip</a> |
| 7720281 | SQUIRREL, SARAH   | 02/04/2023 | 1  | Supplemental Oxygen/Respiratory Support | 001      | <a href="#">Edit</a> | <a href="#">Remove</a> | <a href="#">View the Chip</a> |
| 7720303 | GIRAFFE, RAFFI    | 02/01/2023 | 1  | Echo prior to PO screening              | 12345678 | <a href="#">Edit</a> | <a href="#">Remove</a> | <a href="#">View the Chip</a> |

2

## You may see infants already listed on your MSR:

1. **"Unresolved holdovers"**: Infants entered as exceptions on last month's MSR as being transferred into your facility, in the NICU or needing the initial screen next month.
2. **"Current exceptions"**: Infants that are entered this month, or holdovers that have been promoted.



# Step 7: Review Unresolved Holdovers

Enter MRN  Search

## 1 Unresolved Holdovers

There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to promote the record to an exception on the current report.

| PID     | ID    | Name              | DOB        | BO | Exception                               | MRN |                |                |
|---------|-------|-------------------|------------|----|---|-----|----------------|----------------|
| 7720297 | 67183 | RETRIEVER, MURPHY | 02/01/2023 | 1  | Transfer Out Without Screen             | 123 | <b>Accept</b>  | <b>Decline</b> |
| 7720300 | 67184 | OWL, CLIFTY       | 01/20/2023 | 1  | Supplemental Oxygen/Respiratory Support | 123 | <b>Promote</b> |                |

## Two exception types will create an unresolved holdover:

1. **Supplemental oxygen/respiratory support** (*pulse oximetry exceptions only*)
2. **Transfer out without screen**
  - a. Babies who have been reported as being transferred into your facility will appear in the “unresolved holdovers” table with a **blue background**.

You must “accept” or “promote” all holdovers before submitting the MSR!



# Step 7: Review Unresolved Holdovers

Enter MRN  Search

## Unresolved Holdovers

There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to promote the record to an exception on the current report.

| PID     | ID    | Name              | DOB        | BO | Exception                               | MRN |                         |                         |
|---------|-------|-------------------|------------|----|---|-----|-------------------------|-------------------------|
| 7720297 | 67183 | RETRIEVER, MURPHY | 02/01/2023 | 1  | Transfer Out Without Screen             | 123 | <a href="#">Accept</a>  | <a href="#">Decline</a> |
| 7720300 | 67184 | OWL, CLIFTY       | 01/20/2023 | 1  | Supplemental Oxygen/Respiratory Support | 123 | <a href="#">Promote</a> |                         |

## How Do I Accept or Promote Unresolved Holdovers?

First, identify the holdover type by checking the **exception type and color** of background.

1. Supplemental oxygen/respiratory support
2. Transfer out without screen - Babies who transferred into your facility without NBS will have a **blue background**.

| Exception                               | MRN |                         |                         |
|---|-----|-------------------------|-------------------------|
| Transfer Out Without Screen             | 123 | <a href="#">Accept</a>  | <a href="#">Decline</a> |
| Supplemental Oxygen/Respiratory Support | 123 | <a href="#">Promote</a> |                         |



# Step 7a: Accept, Decline or Promote the Holdovers

Enter MRN  Search

## Unresolved Holdovers

There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to promote the record to an exception on the current report.

| PID     | ID    | Name              | DOB        | BO | Exception                               | MRN |                         |                         |
|---------|-------|-------------------|------------|----|---|-----|-------------------------|-------------------------|
| 7720297 | 67183 | RETRIEVER, MURPHY | 02/01/2023 | 1  | Transfer Out Without Screen             | 123 | <a href="#">Accept</a>  | <a href="#">Decline</a> |
| 7720300 | 67184 | OWL, CLIFTY       | 01/20/2023 | 1  | Supplemental Oxygen/Respiratory Support | 123 | <a href="#">Promote</a> |                         |

## Supplemental oxygen holdovers:

- Click the “promote” link
- Click “edit person information” to update the child’s name (if necessary).
- Scroll to the bottom.
- Update the child’s exception type as needed (e.g., “finally screened”) and click “save exception”



| Exception                               | MRN |                         |                         |
|---|-----|-------------------------|-------------------------|
| Transfer Out Without Screen             | 123 | <a href="#">Accept</a>  | <a href="#">Decline</a> |
| Supplemental Oxygen/Respiratory Support |     | <a href="#">Promote</a> |                         |



# Step 7a: Accept, Decline or Promote the Holdovers

Enter MRN  Search

## Unresolved Holdovers

There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to promote the record to an exception on the current report.

| PID     | ID    | Name              | DOB        | BO | Exception                               | MRN |                         |                         |
|---------|-------|-------------------|------------|----|---|-----|-------------------------|-------------------------|
| 7720297 | 67183 | RETRIEVER, MURPHY | 02/01/2023 | 1  | Transfer Out Without Screen             | 123 | <a href="#">Accept</a>  | <a href="#">Decline</a> |
| 7720300 | 67184 | OWL, CLIFTY       | 01/20/2023 | 1  | Supplemental Oxygen/Respiratory Support | 123 | <a href="#">Promote</a> |                         |

## Transfer out without screen holdovers:

- Check to make sure that newborn is at your facility. If the infant is at your facility, click "accept."
- Click "edit person information" to update the newborn's name (if necessary).
- Update the newborn's exception type and click "save exception".
- If the newborn is not at your facility, click "decline."



| Exception                               | MRN |                         |                         |
|---|-----|-------------------------|-------------------------|
| Transfer Out Without Screen             |     | <a href="#">Accept</a>  | <a href="#">Decline</a> |
| Supplemental Oxygen/Respiratory Support | 123 | <a href="#">Promote</a> |                         |



# Step 5: Enter New Exceptions

Enter the infant's MRN and click "search".

**Note:** Be sure to accurately enter the MRN without any typos.

You will not be able to edit the MRN later.

## Pulse Oximetry MSR Exception Entry - February 2023

Use this form to report exceptions to the pulse oximetry newborn screening process.

Search for Child Record

To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

*Unresolved Holdovers*

There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to promote the record to an exception on the current report.

| PID     | ID    | Name              | DOB        | BO | Exception                               | MRN |                         |                         |
|---------|-------|-------------------|------------|----|---|-----|-------------------------|-------------------------|
| 7720297 | 67183 | RETRIEVER, MURPHY | 02/01/2023 | 1  | Transfer Out Without Screen             | 123 | <a href="#">Accept</a>  | <a href="#">Decline</a> |
| 7720300 | 67184 | OWL, CLIFTY       | 01/20/2023 | 1  | Supplemental Oxygen/Respiratory Support | 123 | <a href="#">Promote</a> |                         |

*Current Exceptions*

There are some exceptions already entered on this MSR. They may be edited while the MSR is open. Please select a record below to edit the detail.

| PID     | Name              | DOB        | BO | Exception                               | MRN      |                      |                        |                               |
|---------|-------------------|------------|----|---|----------|----------------------|------------------------|-------------------------------|
| 7720274 | ARMADILLO, JUNIOR | 02/02/2023 | 1  | Transfer Out Without Screen             | 00001    | <a href="#">Edit</a> | <a href="#">Remove</a> | <a href="#">View the Chip</a> |
| 7720281 | SQUIRREL, SARAH   | 02/04/2023 | 1  | Supplemental Oxygen/Respiratory Support | 001      | <a href="#">Edit</a> | <a href="#">Remove</a> | <a href="#">View the Chip</a> |
| 7720303 | GIRAFFE, RAFFI    | 02/01/2023 | 1  | Echo prior to PO screening              | 12345678 | <a href="#">Edit</a> | <a href="#">Remove</a> | <a href="#">View the Chip</a> |



# Step 5a: Search and Select Infant

Use this form to report exceptions to the heelstick newborn screening process.

Search for Child Record  
To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

56892

| PID     | # | Last Name | First Name | Middle Name | Sex | DOB      | TOB  | Birth Order | Mother's Maiden | Data Source     |                        |
|---------|---|-----------|------------|-------------|-----|----------|------|-------------|-----------------|-----------------|------------------------|
| 5201551 |   | OWL       | OLLIE      |             | 2   | 20120804 | 0222 | 3           |                 | INSTEP          | <a href="#">Select</a> |
| 5201551 |   | OWL       | OLLIE      |             | 2   | 20120804 | 0222 | 3           |                 | Integrated View | <a href="#">Select</a> |

- **If at least one matching result is found:**

- INSTEP will refresh and display all potential matches in a “grid” at the top of your MSR screen.
- Each row in the grid will display a column named “data source” that tells you where that result came from.
- Some rows may have the exact same information.
- IDOH repository (large database) has multiple “views” of data.

- **If you have multiple rows with the same information, they will all lead to the same infant profile if the PID numbers are the same.**

- Click on “Select” on the far right of any line as long as the PIDs are the same.
- If you notice multiple entries for the same infant with different PID numbers, email the **NBS Reporting Coordinator** with the infant’s correct information and all PID numbers listed. The NBS coordinator will give further direction.

# Step 5b: Edit Person Information

## Pulse Oximetry MSR Exception Entry - December 2022

Use this form to report exceptions to the pulse oximetry newborn screening process.

Verify Child Details  
Verify the child's demographic information.

Child Information (INSTEP View)

|                              |               |
|------------------------------|---------------|
| PID:                         | 8968488       |
| Name:                        | JOHN TEST DOE |
| Mother Maiden Name:          |               |
| Date of Birth:               | 12/1/2022     |
| Time of Birth:               | 0000          |
| Date of Death:               |               |
| Gender:                      | Male          |
| Birth Order:                 | 1             |
| NBS Requisition Number:      | Unknown       |
| Medical Record Number (MRN): | 1             |

[Edit Person Information](#)

Verify Mother Details  
Verify the mother's demographic information. An address and phone number are required to complete the exception.

Mother Information

|                |   |
|----------------|---|
| PID:           | 8968487   |
| Name:          | JANE DOE  |
| Maiden Name:   |   |
| Date of Birth: | 3/16/1990   |
| Date of Death: |   |
| Address(es):   | 0000 Source: Integrated View,<br>0000, IN 00000 INSTEP<br>County: |
| Phone Number:  | (000) 000-0000  |
| Email:         |   |

[Edit Person Information](#)

If the infant you are looking is listed, you will click select to edit any information, enter primary care provider's information, and enter exception details.



# Step 5b: Add New Infant

Use this form to report exceptions to the heelstick newborn screening process.

Search for Child Record

To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

56892

| PID     | # | Last Name | First Name | Middle Name | Sex | DOB      | TOB  | Birth Order | Mother's Maiden | Data Source     |                        |
|---------|---|-----------|------------|-------------|-----|----------|------|-------------|-----------------|-----------------|------------------------|
| 5201551 |   | OWL       | OLLIE      |             | 2   | 20120804 | 0222 | 3           |                 | INSTEP          | <a href="#">Select</a> |
| 5201551 |   | OWL       | OLLIE      |             | 2   | 20120804 | 0222 | 3           |                 | Integrated View | <a href="#">Select</a> |

**If no results match, or no results appear, click the child not listed button.**

# Step 5c: Complete Child Details Section

## Enter all information:

- Infant's info
- Mother's info
- PCP info
- Transfer details
- Exception type
- Notes and results

## Pulse Oximetry MSR Exception Entry - February 2023

Use this form to report exceptions to the pulse oximetry newborn screening process.

### Add Child Details

Enter the child and mother demographic information to identify this exception.

#### Child Information

|                     |                                  |   |                |                                |  |
|---------------------|----------------------------------|---|----------------|--------------------------------|--|
| MRN:                | <input type="text" value="111"/> |   |                |                                |  |
| Requisition Number: | <input type="text"/>             |   |                |                                |  |
| Last Name:          | <input type="text"/>             | ! | First Name:    | <input type="text"/>           | <input type="checkbox"/> Child's first name is unknown |
| Middle Name:        | <input type="text"/>             |   | Suffix:        | <input type="text"/>           |  |
| Date of Birth:      | <input type="text"/>             | ! | Time of Birth: | <input type="text"/>           | !  |
| Sex:                | <input type="text"/>             | ! | Birth Order:   | <input type="text" value="1"/> | !  |

#### Mother Information

|              |                                    |   |                      |                      |                      |   |
|--------------|------------------------------------|---|----------------------|----------------------|----------------------|---|
| MRN:         | <input type="text"/>               |   |                      |                      |                      |   |
| Last Name:   | <input type="text"/>               | ! | First Name:          | <input type="text"/> | !                    |   |
| Maiden Name: | <input type="text"/>               |   | Date of Birth:       | <input type="text"/> |                      |   |
| Address:     | <input type="text"/>               |   | <input type="text"/> | IN                   | <input type="text"/> | ! |
| Phone:       | <input type="text" value="( ) -"/> | ! |                      |                      |                      |   |



# Step 5d: Select Primary Care Provider

## Associated Providers

| Name   | Address | City | State | Zip | Phone # | Ext | PCP? |
|--|---------|------|-------|-----|---------|-----|------|
| No providers have been associated with this child yet. |         |      |       |     |         |     |      |

Search for a Provider



- Click on the “search for a provider” button.
- INSTEP will display a pop-up window where you can enter the provider’s last name, first name, and city of practice.
- All fields are “partial search” fields, type any part of the last name:

- Ex. If you were searching for Dr. Greg House, you could type the following combinations into the “last name” box:

- House, Hous, Hou, Ho, H
- Click “search” to look up the provider.

Search Providers

Last Name  ! First Name  City  Search



# Step 5d: Add New Primary Care Provider

## Select the address and phone number you want to use for this provider:

- Locate the line for the provider's address.
- Select the correct phone number from the drop-down menu.
- Click the heart icon if this is the child's PCP.
- Click the "associate" link to add the physician to the infant's list

**Search Providers**

Last Name  ! First Name  City  Search

| Name | Address | City | State | Zip | Phone                | PCP?                     | Edit                 | Associate                 |
|------|---------|------|-------|-----|----------------------|--------------------------|----------------------|---------------------------|
|      |         |      |       |     | <input type="text"/> | <input type="checkbox"/> | <a href="#">Edit</a> | <a href="#">Associate</a> |
|      |         |      |       |     | <input type="text"/> | <input type="checkbox"/> | <a href="#">Edit</a> | <a href="#">Associate</a> |
|      |         |      |       |     | <input type="text"/> | <input type="checkbox"/> | <a href="#">Edit</a> | <a href="#">Associate</a> |
|      |         |      |       |     | <input type="text"/> | <input type="checkbox"/> | <a href="#">Edit</a> | <a href="#">Associate</a> |
|      |         |      |       |     | <input type="text"/> | <input type="checkbox"/> | <a href="#">Edit</a> | <a href="#">Associate</a> |



# Step 5d: Select Primary Care Provider

**Entering PCP information:** click on the heart icon next to the provider's name to indicate they are the PCP.

 Red heart indicates a PCP

 Gray heart for all other providers following the infant.

Associated Providers

| Name | Address | City | State | Zip | Phone # | Ext | PCP?  |
|------|---------|------|-------|-----|---------|-----|---|
|      |         |      |       |     |         |     |  <a href="#">Edit</a> <a href="#">Remove</a>   |
|      |         |      |       |     |         |     |  <a href="#">Edit</a> <a href="#">Remove</a>   |
|      |         |      |       |     |         |     |  <a href="#">Edit</a> <a href="#">Remove</a>   |
|      |         |      |       |     |         |     |  <a href="#">Edit</a> <a href="#">Remove</a>   |
|      |         |      |       |     |         |     |  <a href="#">Edit</a> <a href="#">Remove</a>  |
|      |         |      |       |     |         |     |  <a href="#">Edit</a> <a href="#">Remove</a> |

Select a Frequently Used Provider

Add

Search for a Provider



# Step 6: Select the Exception Type (Heel Stick)

## Select the heel stick exception type:

1. Transfer Out Without Screen
2. Finally Screened
3. Transfused
4. Religious Refusal
5. Deceased
6. Discharged Home Without Screening

Enter Exception Details

Exception Type:  !

Notes:

- Transfer Out Without Screen
- Transfused
- Finally Screened
- Deceased
- Religious Refusal
- Discharged Home Without Screening

Back Reset Cancel Save Exception Save and go to main summary er



# Step 6: Select the Exception Type (Heel Stick)

## 1. Transfer Out Without Screen:

- Use when the infant transfer out of your facility before the initial heel stick was performed.

## 2. Finally Screened:

- Use when the infant finally receives their screening
  - Could be due to holdovers such as being transferred into your facility
  - Always enter the date and time the newborn screening finally occurred

**If infant was transferred out of state, the birth facility must provide the results of the heel stick in addition to the location and date of the screen in the exception notes section.**

## 3. Transfused:

- Use if the infant did not have a heel stick screen performed before receiving a blood transfusion



# Step 6: Select the Exception Type (Heel Stick)

## 5. Deceased:

- Always provide the date and time of death. Sometimes there is a lag in Vital Records, so providing this documentation within the MSR notes section prevents reaching out to the family with NBS follow-up.

## 6. Religious Refusal:

- Use when a family refuses newborn screening due to religious reasons.
- You are required to submit a legible, signed religious waiver to IDOH.
  - Upload in the exception entry.

### **\*Infants in Palliative Care:**

- Infants discharged to hospice ARE NOT exempt from the heel stick.
- **All infants in palliative care/discharged to hospice should have a heel stick performed between 24-48 hours.**
- May only refuse if parents object due to religious reasons and submit the waiver.



### RELIGIOUS WAIVER FOR THE NEWBORN SCREENING PROGRAM

State Form 54102 (R3 / 2-21)  
INDIANA DEPARTMENT OF HEALTH



# Step 6: Select the Exception Type (Heel Stick)

---

## 6. Discharged Home Without Screening:

- Use only if an infant is inadvertently discharged from your facility before an initial heel stick screen is performed.
- **Alert NBS Reporting Coordinator by phone at 317-233-7019 immediately.**
- Submit this exception in INSTEP immediately.
- Document all supporting details within the MSR notes section to assist with follow-up processes.

**IDEALLY, THIS SHOULD NEVER OCCUR.**

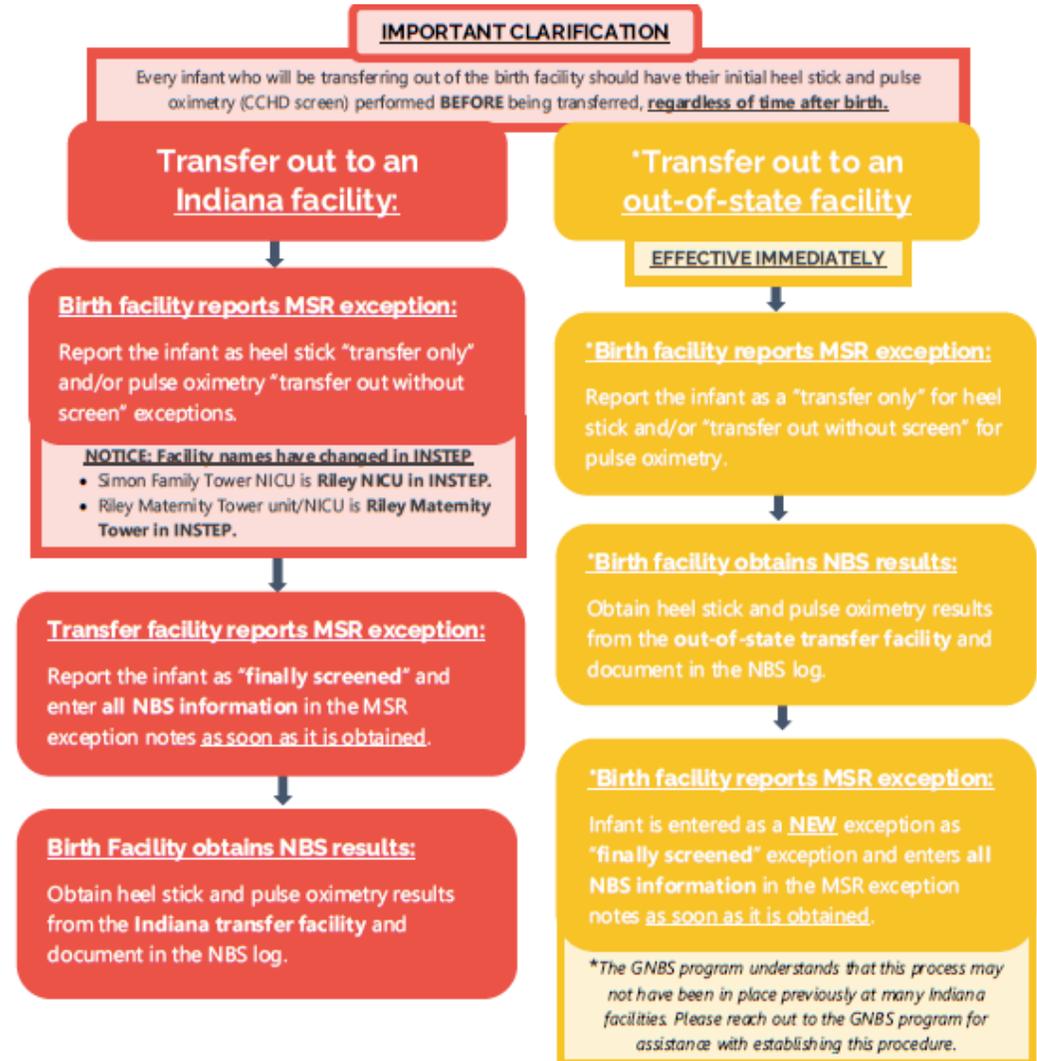


# Step 6a: Transfer Out Exception Procedure

**Important Note:** Every infant who will be transferring out of the birth facility should have their initial heel stick and pulse oximetry screens performed BEFORE being transferred, regardless of time of birth.

## Transfer out follow-up procedure:

- If the transfer is to an out of state facility, the birth facility is responsible for following up to obtain results and report back to INSTEP.
- If the transfer is to an Indiana facility, the receiving facility is responsible for entering the results to INSTEP, though the birth facility should still follow-up to log the results in their NBS log.



# Step 6: Select the Exception Type (Pulse Oximetry)

## Select the CCHD/pulse oximetry exception type:

1. Transfer Out Without Screen
2. Echo Prior to Pulse Oximetry Screening
3. Supplemental Oxygen/Respiratory Support
4. Finally Screened
5. Deceased/Hospice care
6. Religious Refusal
7. Discharged Home Without Screening
8. Prenatally Diagnosed with CCHD

Enter Exception Details

Exception Type:

Notes:

- Deceased/Hospice Care
- Transfer Out Without Screen
- Supplemental Oxygen/Respiratory Support
- Echo prior to PO screening
- Finally Screened
- Religious Refusal
- Discharged HOME Without Pulse Oximetry Screen
- Prenatally Diagnosed with CCHD

Back Reset

# Step 6: Select the Exception Type (CCHD/Pulse Oximetry)

---

## 1. Transfer Out Without Screen:

- Use when the newborn has been transferred out of your facility before a CCHD screen was performed.

## 2. Echo Prior to Pulse Oximetry Screening:

- Use when the infant will not have pulse oximetry performed because they had an echo performed prenatally or immediately after birth, before 24-48 hours have passed.

## 3. Supplemental Oxygen/Respiratory Support:

- Use when the infant will not have pulse oximetry performed due to being placed on supplemental oxygen or other respiratory support.
- It is up to the attending physician to decide whether screening will occur once the infant is removed from the support. Use the MSR Quick Guide's "Supplemental Oxygen" section as a reference.

## 4. Finally Screened

- Use when the infant was previously entered as a transfer out without screen or supplemental oxygen/respiratory support exception to alert GNBS that the infant was screened and **include the pulse oximetry saturations and/or echo result**. This is the same for infants who transferred out of state.

# Step 6: Select the Exception Type (CCHD/Pulse Oximetry)

---

## 5. Deceased/hospice care:

- Use when infant has expired or is discharged to hospice prior to CCHD screening. Always provide the date and time of death or date when discharged to hospice.

## 6. Religious refusal:

- Use when a family refuses newborn screening due to religious reasons.
- A completed and signed Religious Waiver must be submitted immediately. Upload the waiver with the exception in INSTEP, or fax to GNBS if unable to upload.

## 7. Discharged home without pulse oximetry screen: **IDEALLY, THIS SHOULD NEVER OCCUR.**

- Use if a newborn is discharged from your facility before receiving a CCHD screen.
- **Alert NBS Coordinator by phone at 888-815-0006 ASAP and submit this exception immediately.**

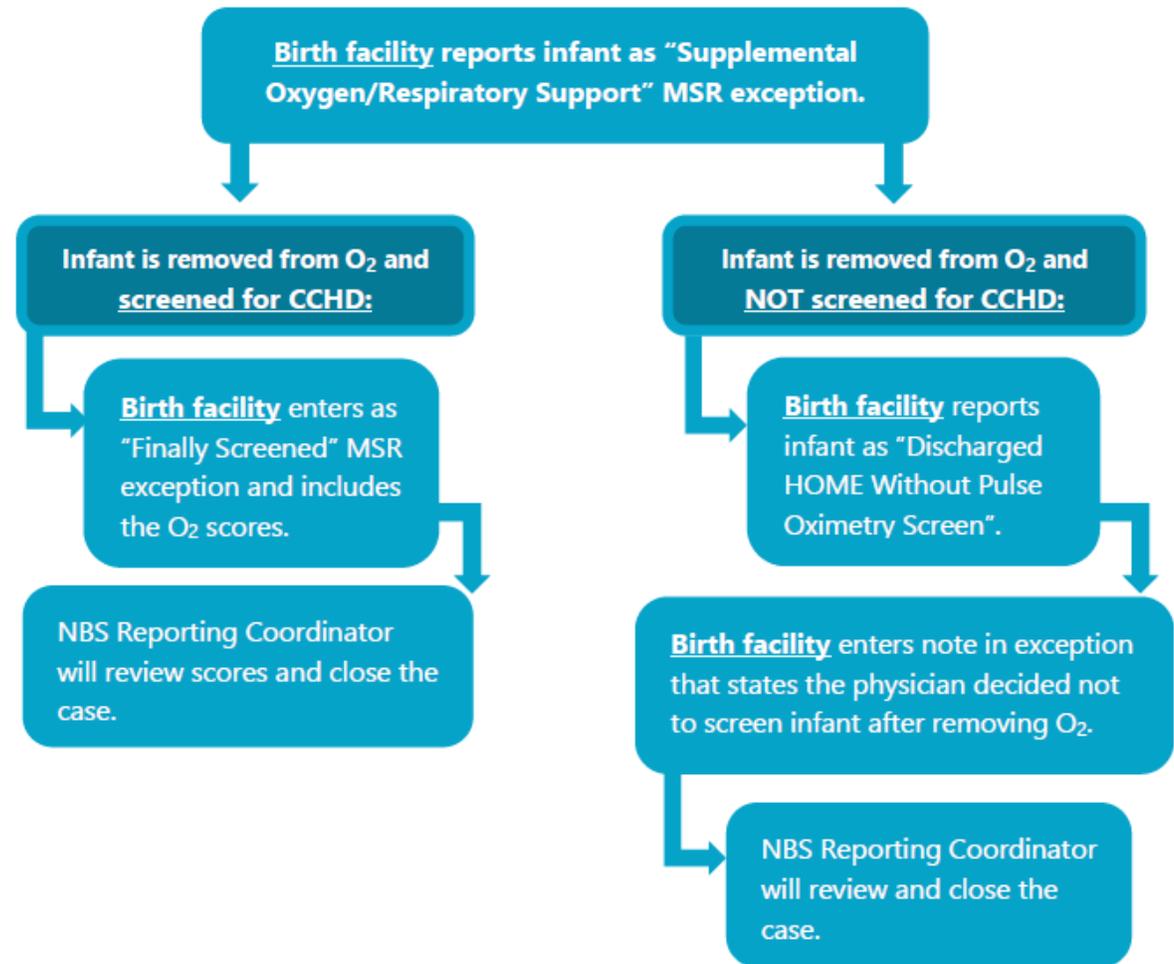
## 8. Prenatally diagnosed with CCHD

- Use when the infant will not be screened because they were diagnosed with a Critical Congenital Heart Defect (CCHD) prenatally.

# Step 6b: Supplemental Oxygen/Respiratory Support MSR Exception

## If the infant is on supplemental oxygen and is remaining in the birth facility:

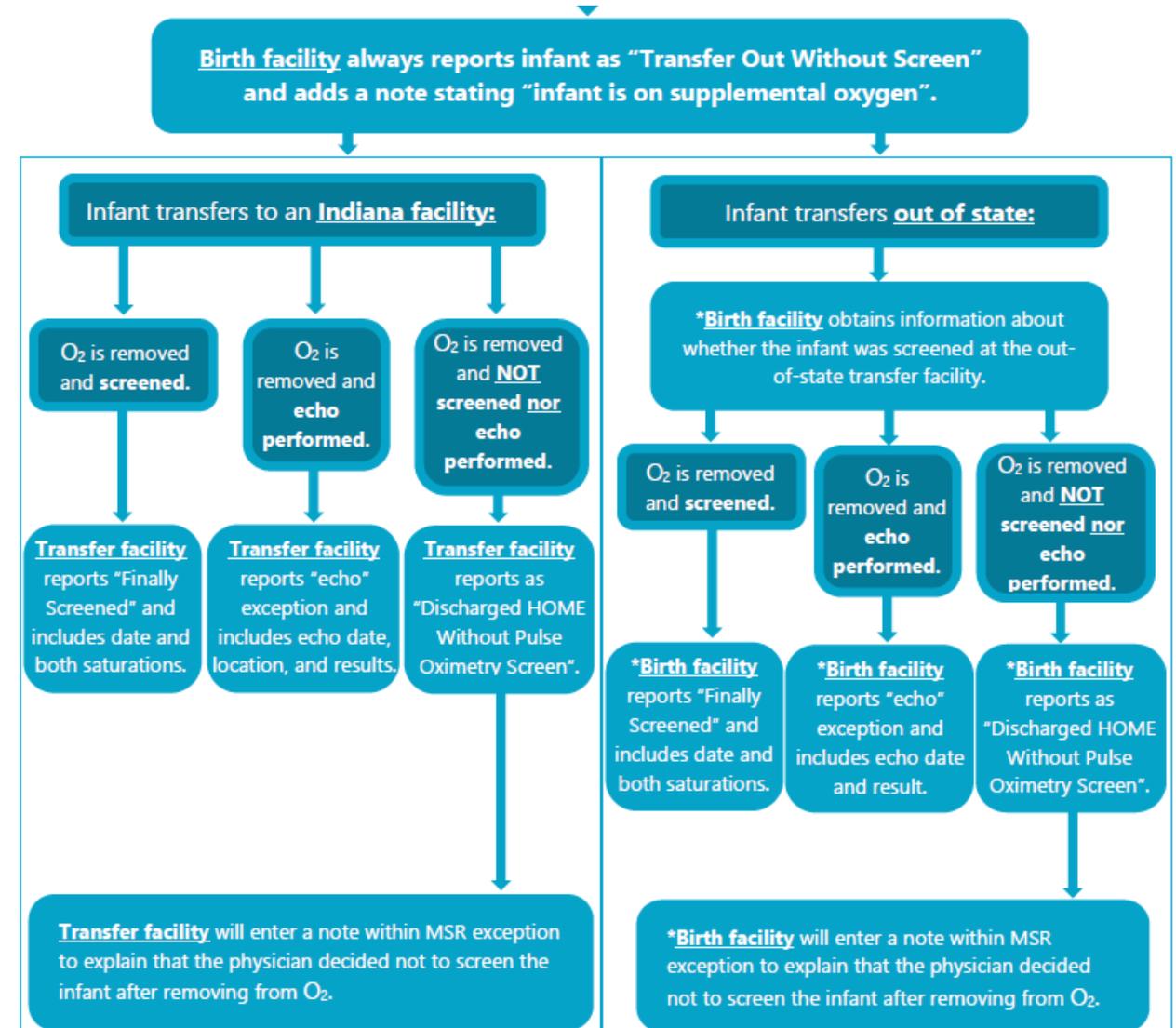
- **Birth facility** will report infant as “Supplemental Oxygen/Respiratory Support” MSR exception type.
- **Birth facility** will either report again as “Finally screened” OR “Discharged HOME without Pulse Oximetry Screen” depending on whether infant was screened once removed.
- **Birth facility** will either provide pulse oximetry scores for right hand and foot if infant was screened OR add a note stating physician chose not to screen the infant for infants not screened.



# Step 6b: Supplemental Oxygen/Respiratory Support MSR Exception

## If the infant is on supplemental oxygen and is transferred out of the birth facility:

- **Birth facility** will report infant as “Transfer Out Without Screen” MSR exception.
- **Birth facility** will add a note within the exception that states the infant is on supplemental oxygen.
- If infant transfers **out of state**, the **birth facility** will reach out to out of state facility to determine whether infant was screened and will report whether infant was screened and provide results.
- If infant transfers to facility **in Indiana**, the **transfer facility** will report whether infant was screened.



# Step 7: Enter Notes

## Enter detailed notes!

GNBS staff can see what you write – and you can see what we write!

Enter Exception Details

Exception Type:  !

Organization name:  !

Transfer Date:  !

Notes:

Initial heel stick collected on 5/16/2023 at Cincinnati Children's Hospital with results coming back as abnormal for hypothyroidism. Repeat heel stick was collected on 5/21/2023 and results came back normal.

Initial pulse oximetry screen performed on 5/16/2023 at Cincinnati Children's Hospital and did not pass (right hand: 90, foot: 93). A second pulse oximetry screen was performed same day and did not pass (right hand: 90, foot: 90). Echo performed at Cincinnati Children's on 5/17/2023 and came back abnormal which indicated CCHD (single ventricle).



# Step 7a: Enter Results for Out of State Transfers

## Type all NBS results for any infant transferred out of state:

- Include **date**, **location**, and **result** of all heel stick and pulse oximetry screens

Enter Exception Details

Exception Type:  !

Organization name:  !

Transfer Date:  !

Notes:

→ Initial heel stick collected on 5/16/2023 at Cincinnati Children's Hospital with results coming back as abnormal for hypothyroidism. Repeat heel stick was collected on 5/21/2023 and results came back normal.

→ Initial pulse oximetry screen performed on 5/16/2023 at Cincinnati Children's Hospital and did not pass (right hand: 90, foot: 93). A second pulse oximetry screen was performed same day and did not pass (right hand: 90, foot: 90). Echo performed at Cincinnati Children's on 5/17/2023 and came back abnormal which indicated CCHD (single ventricle).



# Step 7a: Enter Results for Out of State Transfers

## Procedure for entering results of infants transferred out of state prior to heel stick:

1. Enter infant as a “transfer out without screen” exception immediately.
2. Follow up with transfer facility to obtain NBS results to update your NBS log
3. When heel stick results are received, enter the infant as a “finally screened” exception.
4. Be sure to add the **date**, **location** and **result** (normal/abnormal and Dx) of the heel stick(s) performed before closing the MSR.

Initial heel stick collected on 5/16/2023 at Cincinnati Children's Hospital with results coming back as abnormal for hypothyroidism. Repeat heel stick was collected on 5/21/2023 and results came back normal.

*\* This may require a practice change at your facility.*



# Step 7a: Enter Results for Out of State Transfers

## Procedure for entering results of infants transferred out of state prior to **CCHD screen/pulse oximetry**:

1. Enter infant as a “transfer out without screen” exception immediately.
2. Follow up with transfer facility to obtain NBS results to update your NBS log.
3. When all pulse ox scores and/or echo results are received, enter the infant as a “finally screened” exception.
4. Be sure to add the **date**, **location** and **result** of all pulse ox screens (O<sub>2</sub>% from RH and foot) and/or echocardiograms (normal/abnormal and Dx).

Initial pulse oximetry screen performed on 5/16/2023 at Cincinnati Children's Hospital and did not pass (right hand: 90, foot: 93).  
A second pulse oximetry screen was performed same day and did not pass (right hand: 90, foot: 90).  
Echo performed at Cincinnati Children's on 5/17/2023 and came back abnormal which indicated CCHD (single ventricle).

*\* This may require a practice change at your facility.*



# Step 8: Save the Exception!

## When you're ready to save this exception:

- Click the **"save exception" button** to go back to the MSR exception list to enter additional exceptions

**OR**

- Check the **box** and click **"save exception"** to save this exception and be taken to the MSR summary entry page if there are no additional exceptions that need to be entered.

Enter Exception Details

Transfer Detail:  !

Exception Type:  !

Notes:

Save and go to MSR Summary entry





## 4. MSR Summary Entry



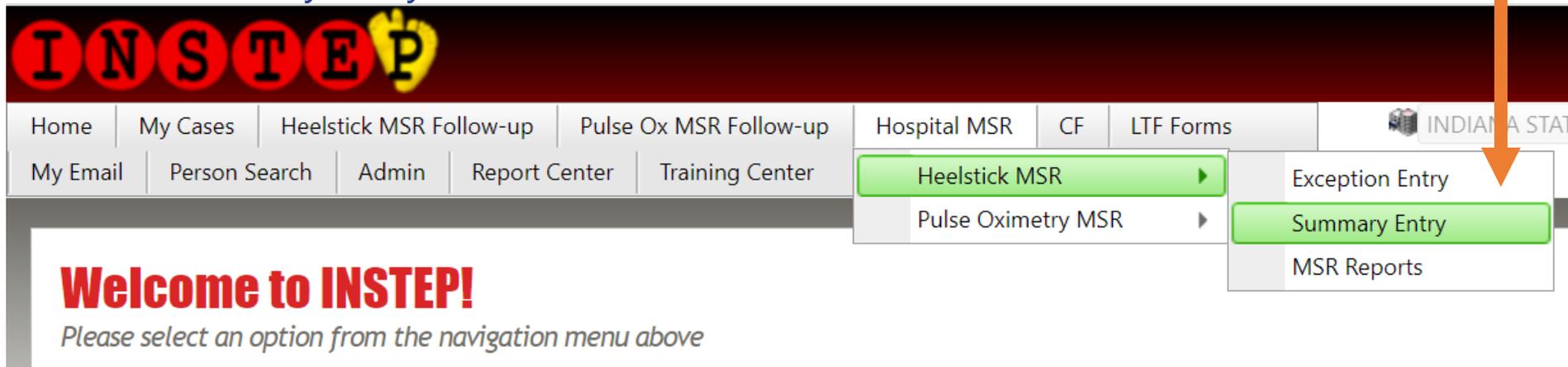
**Indiana**  
Department  
of  
**Health**



# Entering MSR Summary

## To begin entering summary data:

- Ensure **ALL** exceptions have been entered first and holdovers have been updated.
- Hold your mouse over “hospital MSR”.
- Select the MSR type (e.g., heel stick) for which you need to enter summary data.
- Click “summary entry.”



The screenshot shows the INSTEP application interface. At the top, the word "INSTEP" is displayed in large, stylized letters. Below this is a navigation menu with several options: Home, My Cases, Heelstick MSR Follow-up, Pulse Ox MSR Follow-up, Hospital MSR, CF, LTF Forms, and INDIANA STAT. The "Hospital MSR" option is highlighted, and a dropdown menu is open, showing three options: Heelstick MSR, Pulse Oximetry MSR, and MSR Reports. The "Summary Entry" option is highlighted in green. An orange arrow points to the "Summary Entry" option. Below the navigation menu, the text "Welcome to INSTEP!" is displayed in red, followed by the instruction "Please select an option from the navigation menu above".



# Entering MSR Summary

## Enter the following:

- **Number of live births** at your facility in that month
- **Number of home births** who received screening at your facility in that month
- **Number of walk-ins** who received screening at your facility that month

### Heelstick MSR Summary

Submit a summary of birth data when all heelstick exceptions have been entered for the month.

Please select an MSR to view or enter summary data.

Organization name:  
 !

Year:

| ID     | Year | Month   | Contact      | Created              | Closed |        |       |
|--------|------|---------|--------------|----------------------|--------|--------|-------|
| 101916 | 2023 | January | Voss, Meegan | 1/4/2023 11:29:07 AM |        | Select | Print |

[Print MSR Submission Report](#)

MSR Summary Data

Please enter the summary data for the MSR. Enter the total number of live births, home births, and walk-ins that received newborn screening at your facility during the month. Exceptions reported and number of screens will be calculated automatically based on entered data.

MSR Status:

Number of live births:

Number of home births that received screening:

Number of walk-ins that received screening:

Number of exceptions reported:

Number of screens:



# Entering MSR Summary

Select one of the two buttons at the bottom of the screen to close the MSR.

## Heelstick MSR Summary

Submit a summary of birth data when all heelstick exceptions have been entered for the month.

Please select an MSR to view or enter summary data.

Organization name:  !  
Year:

| ID     | Year | Month   | Contact      | Created              | Closed |        |       |
|--------|------|---------|--------------|----------------------|--------|--------|-------|
| 101916 | 2023 | January | Voss, Meegan | 1/4/2023 11:29:07 AM |        | Select | Print |

[Print MSR Submission Report](#)

MSR Summary Data

Please enter the summary data for the MSR. Enter the total number of live births, home births, and walk-ins that received newborn screening at your facility during the month. Exceptions reported and number of screens will be calculated automatically based on entered data.

MSR Status:

Number of live births:

Number of home births that received screening:

Number of walk-ins that received screening:

Number of exceptions reported:

Number of screens:



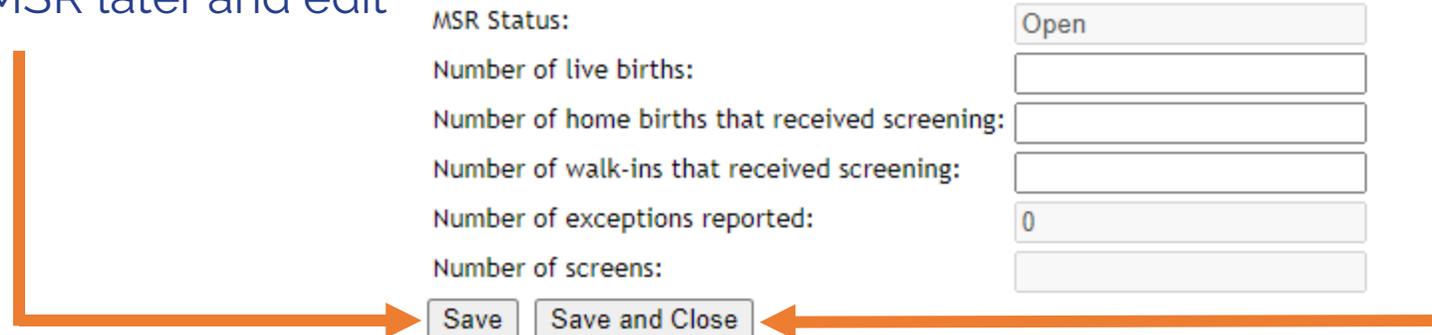
# Entering MSR Summary

## When to “save”

- You have entered some exceptions and your summary data, but you need to come back & finish your MSR later
- You may have to add, delete, or edit an exception..
- Clicking this button will **save** your MSR, but **not submit** it.
- You can open this MSR later and edit the info.

## When to “save and close”

- You are finished entering all exceptions and summary data.
- Clicking this button will **close and lock your MSR & submit it to IDOH!**
- Once your MSR has been submitted, it is **LOCKED**. You cannot add, edit, or delete exceptions or change your summary data.



MSR Status:

Number of live births:

Number of home births that received screening:

Number of walk-ins that received screening:

Number of exceptions reported:

Number of screens:

Two orange arrows originate from the text in the 'When to “save”' section. One arrow points from the text 'You can open this MSR later and edit the info.' to the 'Save' button. The other arrow points from the text 'Clicking this button will save your MSR, but not submit it.' to the 'Save and Close' button.

# Entering MSR Summary

## What if the MSR is closed by accident?

If the MSR is closed by accident, **it is okay**. Contact the **NBS Reporting Coordinator**:

- **Call 317-233-7019**
- **Email**  
[NewbornScreening@health.in.gov](mailto:NewbornScreening@health.in.gov)



# Need Help with MSRs?

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## Questions?

For help with MSR access, entering MSRs or other follow-up needs, contact:

## Newborn Screening Reporting Coordinator

Phone: 317-233-7019

Email: [NewbornScreening@health.in.gov](mailto:NewbornScreening@health.in.gov)

Fax: (317) 234-2995



# Check These Out

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## Indiana **TRAIN**

- Newborn screening processes
- Heel stick collection quality
- After newborn heel stick screening
- Policy and guidelines for newborn screening in Indiana



# We Want to Hear From You!

We want to ensure we provide you with the resources and knowledge to make the newborn screening process as smooth as possible for all our NBS partners!

Let us know if you have any feedback or would like additional resources created!



# Contact Information

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## Genomics and Newborn Screening Program:

[NewbornScreening@health.in.gov](mailto:NewbornScreening@health.in.gov)

Phone: 888-815-0006

[www.nbs.in.gov](http://www.nbs.in.gov)

## Newborn Screening Laboratory:

Phone: 317-278-3245

Fax: 317-321-2495

## Early Hearing Detection and Intervention (EHDI) Program:

Hearing screen MSR (EARS) and follow up information can be obtained online at [www.hearing.in.gov](http://www.hearing.in.gov)



**NEWBORN SCREENING**  
INDIANA





**THANK YOU!**

